



# REGISTER OF DEEDS

## Criteria for a Completed Real Estate Transfer Return (Form PE-500) With Instructions for County Officials (Section V)

### Introduction

The return must be filled out completely in the manner as described in the Instructions (PE-500a). All information on the return is useful to either the local assessor, other municipal and county officials and staff of the Department of Revenue who have a statutory responsibility in the administration of Wisconsin tax laws. Section 77.22(1) of the Wisconsin Statutes provides that "...submission of a completed real estate transfer return and collection by the register of the fee shall be prerequisites to acceptance of the conveyance for recording." Since your refusal to record an instrument which conveys an interest in real estate is a matter of considerable consequence to the parties concerned, these guidelines will assist you in making a judgement as to when a particular return is incomplete to warrant rejection of the conveying document from recordation.

**General:** The PE-500 (R. 1-2000) (green) **MUST** be used for any conveyance dated on or after 1/1/2000.  
The PE-500 (R. 1-2000) (green) may be used for any conveyance prior to 1/1/2000.  
The prior PE-500 (blue) can only be used for conveyances dated prior to 1/1/2000.

**Section I: GRANTOR** - Mark box if more than ONE (1) grantor. An addendum is not required if more than one.

- (1-3) Must be completed. N/A is not acceptable. At least one name must appear on the form itself regardless of any additional addendums.  
(67-70) Section X - Must be completed.

**Section II: GRANTEE** - Mark box if more than ONE (1) grantee. An addendum is not required if more than one.

- (4-10) Must be completed. N/A is not acceptable. At least one name must appear on the form itself regardless of any additional addendums. If newly formed entity and FEIN has not been received, use "applied for".

**TAX BILL BOX** – If not checked, tax bill will be sent to grantee's address above. If tax bill is to be sent to a different address, check box and Lines (62 – 66) must be completed.

### Section III: PROPERTY TRANSFERRED

- (11) One box must be checked and check box if additional parcels are on an addendum.  
(12-13) Must have name of municipality and county completed.  
(14) Must be completed. If vacant land, use the street or road name that will be used to access the property.  
(15) Must be completed. If newly split parcel, insert "Part of" and use parcel number from the original parcel.  
(16) Must be completed. A copy of the deed may be used as an addendum for the legal description, check box after Line (17).  
(17 a,b,c) If property is in a Town – must be completed. If Village or City, may be left blank.

### Section IV: COMPUTATION OF FEE OR STATEMENT OF EXEMPTION

- (18) Must be completed with **total value of real estate** being transferred; only exception if exempt by exemptions 3 or 17.  
(19) Must be completed if fee due. Leave blank if exemption applies per Line (20).  
(20) Transfer Exemption Number; leave blank if fee due.  
(20a) Must be completed if (20) is exempt by exemption 3 or 17.  
(20b) Must be completed if (20) is exempt by exemption 17.  
(21-22) If not applicable, leave blank.

**Section V: TO BE COMPLETED BY AUTHORIZED COUNTY OFFICIAL** – SEE BOTTOM OF PAGE 2.

**Section VI: TRANSFER**

- (39) Grantor/Grantee Relationship; one box must be marked. Family or Other must be explained.
- (40) Type of Transfer; one box must be marked.
- (41) Ownership interest transferred; one box must be marked.
- (42) Grantor Retaining rights; one box must be marked.
- (43) Grantor is; one box must be marked.

**Section VII: GRANTEE'S FINANCING**

- (44) Grantee's Financing; at least one box must be marked. **NOTE:** If any type of financing is provided by the Seller (credit, gift, donation to non-profit/charitable, land contract, etc.) the box "Obtained from seller" **MUST** be checked along with any other box describing other financing obtained by the buyer.

**Section VIII: PHYSICAL DESCRIPTION AND GRANTEE'S PRIMARY USE OF PROPERTY**

- (45) Type of Property; one box must be marked. Other must be explained.
- (46a) Predominant Use; one box must be marked.
  - If Multi-family is marked, fill in number of units.
  - If Agricultural is marked, answer question Yes or No.
  - Explain if Commercial, Utility, Manufacturing/Telephone or Miscellaneous.
- (46b) Check if grantee's primary residence.
- (47a-b) Estimated Land Area; 47a or 47b one box must be completed.
- (48-49) If not applicable, leave blank.

**Section IX: ENERGY**

- (50-52) Energy; If (50) is No, (51) must be completed and if W-12, (52) must be completed.

**Section X: CERTIFICATION**

- (53-59) If Agent signing, must be completed.
- (60-61) Complete if return prepared by someone other than the grantor, grantee or their agent.
- (62-66) If tax bill is to be sent to a different address than Grantee's on Lines (4-10), must be completed.
- (67-70) Must be completed.
- (71-73) Grantor or Agent Signature, dated and telephone number – **REQUIRED**; complete (53-59) if agent.
- (74-76) Grantee or Agent Signature, dated and telephone number– **REQUIRED**; complete (53-59) if agent. Signatures may be in blue or black ink.

**INSTRUCTIONS FOR COUNTY OFFICIALS**

**Section V: TO BE COMPLETED BY AUTHORIZED COUNTY/LOCAL OFFICIALS**

- (23-27) After you have reviewed and accepted the form, enter the Document Number, Volume/Jacket, Page/Image (as applies), date recorded, and date of conveyance.
- (28) Mark the box that indicates the kind of conveyance recorded. If Other is entered, explain on line provided (e.g. sheriff's deed, personal rep., trustee deed, etc.).
- (29-32) Enter the two digit county code and the three digit municipal code in the boxes provided. If the sale is in more than one municipality, use 31 and 32 to enter the second set of codes. If sale is in more than two municipalities, also place an X in the box provided after number 32.
- (33-38) These areas are to remain blank.